

EIKON DOCUMENTS 2007

USER'S GUIDE

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AUDIENCE

This guide's purpose is to support the user on document insertion, document modification and document retrieval, using the Eikon® Documents web interface.

This guide, therefore, is not intended for development and deployment of new ECM - *Enterprise Content Management* – applications. The Administrator's Guide should be used for that purpose.

For special customizations and integration with other enterprise applications, developers should consult the application programming interface – API documentation.

SOFTWARE CONFIGURATION

The text of the guide matches release 2.9.6 of the Eikon® Documents software.

GETTING MORE INFORMATION

Visit Eikon's web site: www.eikon.com.br

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INTRODUCTION

Eikon® Documents is application software that manages the storage and retrieval of all organization's controlled documents.

Eikon® Documents is used to deploy ECM - *Enterprise Content Management* and/or EDM - *Electronic Document Management* systems. The systems' users can access authorized documents using the software standard web interface or by using especially customized applications.

The standard web interface is accessible through any browser compatible with the following W³C standards: HTML 4.01, CSS1 and DOM1. Among others, these browsers meet those standards: Microsoft® Internet Explorer® 6+ and Firefox 2+. Obviously, the browser must have network connection, via an intranet or extranet, to the site that hosts the Eikon® Documents server software.

The **SOFTWARE WEB INTERFACE BEHAVES DIFFERENTLY FOR EACH USER**, and the content displayed is automatically formatted by the software at the beginning of each working session. Such content may change when changes occur in the settings established by the **APPLICATION ADMINISTRATOR**. In the context of this guide, the Application Administrator is to be understood as the professional or professionals, responsible for the organization ECM / EDM applications.

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The purpose of this guide is to explain how the software standard web interface can be used. You might start by reading Chapter 2 which introduces the basic concepts of the software product. Chapter 3 describes how to use the web interface.

2

BASIC CONCEPTS

Main functionalities. The concept of a document. Controlling user access. Using folders as shortcuts to documents. Automated document lists. Performing a quick search. Searching for file content. Assigning tasks. Associating documents.

WHAT EIKON DOCUMENTS DOES?

Eikon® Documents automates all important tasks related to the safe storage and retrieval of enterprise digital documents. The most important of those tasks, perhaps, is the complete elimination of the need to know the name of every document file that needs to be retrieved and where it is actually stored.

Any user using the software may create a new document and never need to worry about the physical location to store it and how to name it.

Everything that the software user needs to do is identify their properties - *called attributes in the software parlance*, by filling in the form developed specifically for each document class.

CLASSES are collections of documents that share similar logical characteristics. Examples: drawings, invoices, letters, etc. See on next page the example of a new document filled form for the class **BOOK** to be inserted at state **REGISTERING** of the life cycle.

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ADD BOOK [REGISTERING]

Complete and submit the form

Type	Brazilian novels
Number	{auto}
Title	Memórias póstumas de Braz Cubas
Author	Machado de Assis

The above form is the result of the configurations set by the *Application Administrator*, who established that each book should be identified by the grouping of the values for the attributes **TYPE AND NUMBER** - *which labels appear in bold*. In this case, the value assigned for the attribute Number of each new document should be automatically generated by the software.

As soon as the attributes values have been sent to the server, records will be added to the database, thus beginning the life cycle of the new document.

The new document, once created, becomes available for retrieval by authorized users, through the informed values of attributes. Only users duly authorized by the Application Administrator will have permission to access, create and modify its contents.

WHAT IS A DOCUMENT?

A document is the **BASIC UNIT OF INFORMATION** of interest to an organization. In the Object Model implemented by the Eikon® Documents software, a document is formed by its contents - *files* - and its metadata - *attributes*. Take the example of a document of the **BOOK** class, viewed through the web interface:

BOOK: RB-0031				
Files				
Name	Type	Size	Reserved	
Memórias Póstumas de Braz Cubas.pdf	Adobe Acrobat Document	413 kB		
Attributes				
Class	Book			
Type	Brazilian novels			
Number	0031			
Title	Memórias póstumas de Braz Cubas			
Author	Machado de Assis			
State	Registering			

CONTENTS

The document contents may consist of **ZERO, ONE OR MORE FILES**. These files are created, viewed, annotated or modified by specific programs, outside of the scope of the Eikon® Documents software. Eikon® Documents applications may include integration with content authoring tools.

Contents examples: letters and specifications produced by word processors, financial plans made using spreadsheet software, CAD drawings, scanned paper documents, digital photos, MP3 music files, etc.

METADATA

Metadata is data about other data. The metadata of an Eikon® Documents document includes attribute values following the rules established by the Application Administrator for its respective document class. It also includes other attributes created and maintained automatically by the software, like document class identification, document name, document description, current state within the *document class life cycle* and data about user events regarding that document.

The attributes set by the Application Administrator for a specific document class must ensure the unique identification of each document within that class, enable its easy location and retrieval and, if applicable, the correct control of document versions.

VERSIONS

Some document classes, under the Application Administrator criteria, may require the concept of versions. For each of those classes, the Application Administrator must establish a rule to define which attribute values should be concatenated to define the document version value.

In the Eikon® Documents Object Model, different versions of a document correspond to different document instances that happen to have the *same value for the name* and *different value for the version*.

PERMISSIONS

Permissions granted by the Administrator regulate what can be done by each user.

The Eikon® Documents Object Model implements the paradigm of permissions to control the insertion, modification, search and retrieval of stored documents. The permissions, which are created and modified only by the Administrator(s), define how a particular user can interact with documents currently in a particular state of that document class life cycle.

An individual permission is assigned to a **SINGLE STATE OF THE DOCUMENT CLASS LIFE CYCLE** and to a **SINGLE USER GROUP**. Any permission has the following properties:

- type - *full, read-only or limited read-only*
- duration - *permanent or temporary*
- status - *active or inactive*

Selected file types can be considered as of restricted retrieval, at the discretion of the Application Administrator. Thus, users who only have limited read-only permissions are prevented from accessing these file types.

Every user may belong to **ONE OR MORE GROUPS**. As a result, the permissions available for a certain user are the same permissions set for the groups wherever the user belongs as member.

A user can have, on the basis of being a member of several groups, more than a single permission granted to a particular state of the document class lifecycle. The stronger permission always prevails.

PERFORMING A QUICK SEARCH

Entering a simple **SEARCH STRING**, the user can quickly find all documents that contain that search string in their metadata. Only documents for which the user has active access permission will be retrieved.

In the following example the user has ran a quick search using the string LIMA.

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The screenshot shows the top navigation bar of the Eikon Documents 2007 interface. It includes a search bar, a dropdown menu for 'All Document Metadata', and links for 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', 'Logout', and 'Generate report'.

QUICK SEARCH FOR [LIMA] ON ALL DOCUMENT METADATA

Only last version

4 selected documents, in order of [Last Update]

Class	Name	Version	State	Description	Last update
🔍 R Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
🔍 Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
🔍 Book	RB-0018		Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
🔍 Book	RB-0015		Released	Os Bruzudangas-Lima Barreto	14/05/2010 11:24:52

SEARCH FOR FILE CONTENTS

Since Eikon® Documents Release 2.9.3 and provided that this optional feature has been sanctioned by the Information Technology area of your organization, every user can find documents by searching text inside their searchable files.

The searchable files of any document are usually those file types based on textual information, such as PDF and Microsoft® Office® files. For more details, check the Information Technology area of your organization.

A user can only retrieve files belonging to the contents of authorized documents.

The screenshot shows the top navigation bar of the Eikon Documents 2007 interface, identical to the previous one. It includes a search bar, a dropdown menu for 'File Contents', and links for 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', 'Logout', and 'Generate report'.

SEARCH BY CONTENT [PALMEIRAS]

6 selected files, ordered by rank.

Class	Name	Version	State	Description	Rank	File	Size
🔍 Book	RB-0021		Released	Iracema-José de Alencar	4	IRACEMA.pdf	404 kB
🔍 Book	RB-0006		Released	A carne-Júlio Ribeiro	1	ACARNE.pdf	378 kB
🔍 Book	RB-0021		Released	Iracema-José de Alencar	1	iracema.rtf	296 kB
🔍 Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	0	brascubas.pdf	401 kB
🔍 Book	RB-0008		Released	O Cabeleira-Franklin Távora	0	o_cabeleira.pdf	374 kB
🔍 Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	0	o_cemiterio_dos_vivos.rtf	397 kB

SENDING AND RECEIVING TASKS

Tasks streamline shared processes – *collaboration* - and the distribution of documents. All users can submit tasks associated with authorized documents and assign it to other users who share equivalent permissions. The tasks in the Eikon® Documents Object Model comply with the following characteristics:

- *One Document*: every task relates only to a single document.
- *Sender / Recipient*: every task has a single sender and a single receiver. However, with a single click in the web interface, any user can send multiple identical tasks to multiple recipients.
- *Due Date*: every task is associated with a deadline.
- *Description*: every task contains a text describing the activities which the sender expects the recipient to accomplish.
- *Type*: every task fit in to one of the following types:
 - ❖ *For your information*: simply informative task about the document.
 - ❖ *Action required*: the sender requires the recipient to perform a change of document state and/or to modify the attributes values or file contents of the document.
- *Notify by e-mail*: should the software send or not an email to the recipient about the task.

On the notification e-mail, the recipient receives an internet address - *URL* - of the document involved, a link that can only be accessed after the user is authenticated and actual user access permissions are verified.

Senders, at the discretion of recipients, can also be notified by e-mail when tasks have been completed.

In the example shown below, the user is assigning tasks informing another user about her enthusiasm for a specific book.

BOOK: RB-0021 - SEND TASKS

The screenshot shows a software interface for creating a new task. At the top, it says 'Enter new tasks data'. Below that, there are fields for 'Type' (set to 'For your information'), 'Notify by email' (checkbox checked), 'Due' (date set to 16/04/2011), and a 'Task description' box containing the text: 'This is a very interesting book about the indigenous people of Brazil.' Underneath the description box, there is a list of users with checkboxes: 'Administrador Biblioteca [Administrador]' (unchecked), 'Peter Silva [Enterprise]' (unchecked), and 'Thomaz Ayres [Bibliotecario]' (checked). At the bottom of the dialog are 'Submit', 'Check all', and 'Uncheck all' buttons.

Document main page

AUTOMATIC ASSIGNMENT OF TASKS

Since Release 2.9.5 of the software, the Application Administrator can use the **ADVANCED SETTINGS** features in order to schedule the automatic assignment of tasks under certain circumstances, such as:

- Insertion of new document
- Document attributes have changed
- Document contents have changed
- Document state have changed – *performing state transition actions*

Automated tasks may embrace e-mail notification and the Application Administrator may set the default time span - **IN DAYS** – that the recipient has to perform each task sent automatically.

VIRTUAL FOLDERS

Users can create virtual folders for easy document retrieval. Virtual folders are completely independent from the storage system and the physical location of document files.

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Virtual folders are used by Eikon® Documents to streamline the retrieval of frequently looked-for documents. Each stored document can be linked to one or more folders. Those links do not imply any document copying; links should be understood as alternative shortcuts to access a document. Eliminating a link from one document to a particular folder has no effect on the actual document storage.

Folders are used as shortcuts for easy access to all documents relating to particular acts or facts of concern to users, such as products, projects, clients, processes, etc.

Eikon® Documents supports **PUBLIC AND PRIVATE** folders, which can be **STATIC OR DYNAMIC**. Public folders are the responsibility of the Application Administrator. *For the procedures for adding, modifying and deleting public folders, see the Administrator's Guide.*

STATIC PUBLIC FOLDERS

Public folders are organized in a hierarchical and unified structure and embody the interests of the entire community of users providing a unified view.

The visible contents of each folder – *linked documents* - change from user to user. What each user may retrieve when *opening* any folder is determined by the corresponding permissions set for each document that is linked to that particular public folder.

Linking documents to public static folders is performed by authorized users, and the same document can be **PUBLISHED** - *linked* - in more than one public static folder. Each publication can be made on a permanent or temporary basis. See the following example:

The screenshot shows a web-based application interface for Eikon Documents. At the top, there is a navigation bar with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, and Logout. On the right side of the header, there is a context menu with options: Mark Folder, Generate report, and Up one level. Below the header, the main content area has a title 'NEW BOOKS' with a book icon. It displays a table with two rows of data. The table columns are Class, Name, Version, State, Description, and Last update. The first row shows a 'Book' class, version RB-0031, released state, description 'Memórias póstumas de Braz Cubas-Machado de Assis', and last update 15/04/2011 14:39:01. The second row shows a 'Book' class, version RB-0021, released state, description 'Iracema-José de Alencar', and last update 14/05/2010 11:24:55. At the bottom of the table, it says '2 selected documents, in order of [Last Update]'. At the very bottom of the page, there is a timestamp '15/04/2011 14:39:23'.

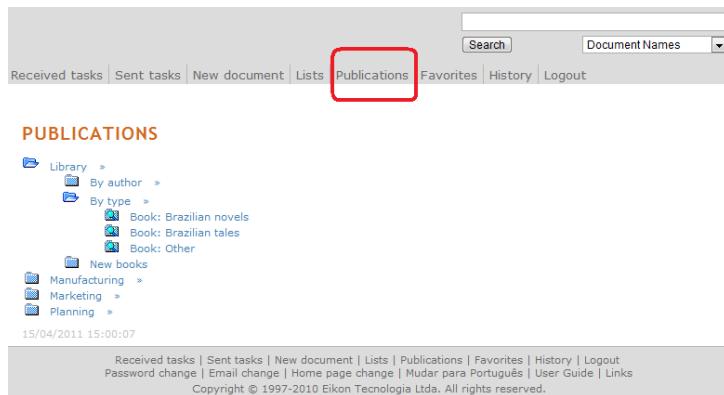
Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55

DYNAMIC PUBLIC FOLDERS

Dynamic public folders - OR SMART PUBLIC FOLDERS - represent dynamic collections of documents automatically gathered by the software at each *opening* of that kind of folder, based on the stored folder SEARCH PARAMETERS.

Dynamic public folders are created and maintained by the Applications Administrator and regular users can only access those that fit into the document classes for which the user has access permissions.

Documents are only presented if their current life cycle state has the procedure parameter **CAN PUBLISH** set as **TRUE**, by the Application Administrator.



The following example shows the result of *opening* the public dynamic folder BRAZILIAN NOVELS. This folder was created by the Application Administrator to collect, automatically, all documents belonging to *the BOOK document class*. This folder was created as a subfolder of the static public folder called LIBRARY.

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The screenshot shows a search results page for 'BOOK: BRAZILIAN NOVELS'. At the top right are buttons for 'Show parameters', 'Generate report', and 'Up one level'. Below the title is a link 'Only last version'. A note says '17 selected documents, in order of [Last Update]'. The main area is a table with columns: Class, Name, Version, State, Description, and Last update. The data includes:

Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
Book	RB-0019		Released	A Condessa Vésper-Aluízio de Azevedo	14/05/2010 11:24:54
Book	RB-0018		Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
Book	RB-0017		Released	Cinco minutos-José de Alencar	14/05/2010 11:24:54
Book	RB-0016		Released	Casa de pensão-Aluízio Azevedo	14/05/2010 11:24:53
Book	RB-0015		Released	Os Bruzudangas-Lima Barreto	14/05/2010 11:24:52
Book	RB-		Released	Aventuras de Diófanes-Tereza Margarida	14/05/2010

STATIC PRIVATE FOLDERS

Static private folders represent static collections of documents established by a particular user. Any authorized user can create any number of folders and can link each folder to any number of documents. Each folder must have a unique name, different from other folders names for the same user.

The user private folders are not visible by other users. However, the documents that are linked to those folders are still accessible by other users, which may link them to their own folders.

See the following example wherein the user created a folder and linked three documents at his/her sole discretion.

The screenshot shows a search results page for 'ONGOING WORK'. At the top right are buttons for 'Mark Folder', 'Change Folder', 'Delete Folder', and 'Generate report'. Below the title is a note '2 selected documents, in order of [Class/Name/Version]'. The main area is a table with columns: Class, Name, Version, State, Description, and Last update. The data includes:

Class	Name	Version	State	Description	Last update
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

At the bottom left is the date '15/04/2011 15:06:35'. The bottom right contains a footer with links: Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout, Password change | Email change | Home page change | Mudar para Português | User Guide | Links, Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

DYNAMIC PRIVATE FOLDERS

Dynamic private folders - OR PRIVATE SMART FOLDERS - represent dynamic collections of documents to be gathered automatically by the software when *opening* each folder based on the stored search criteria. The private dynamic folders fit only to document classes for which the user has access permissions. The user must define a different name for each private dynamic folder belonging to any particular document class and can create as many folders as desired.

The following example shows the result of *opening* the private dynamic folder NOVELS OF MACHADO DE ASSIS AND LIMA BARRETO. This folder was created by the user to collect, automatically, all documents within the BOOK document class of this particular kind and written by both cited authors.

The screenshot shows a search results page for a dynamic private folder named "NOVELS OF MACHADO DE ASSIS AND LIMA BARRETO". The results are filtered to show only the last version of each document. The table lists seven documents, all of which are of the "Book" class and have been "Released". The results are ordered by "Last update".

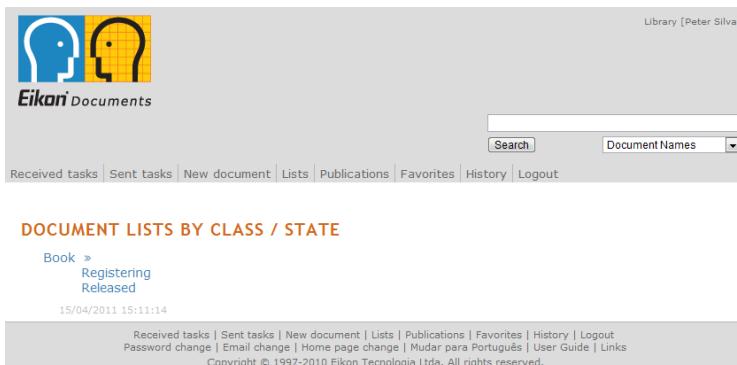
Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
Book	RB-0018		Released	Clara dos Anjos-Lima Barreto	14/05/2010 11:24:54
Book	RB-0015		Released	Os Bruzudangas-Lima Barreto	14/05/2010 11:24:52
Book	RB-0011		Released	Iaiá Garcia-Machado de Assis	14/05/2010 11:24:50
Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	14/05/2010 11:24:50
Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49

Below the table, a timestamp "15/04/2011 15:08:10" is displayed. At the bottom of the page, there is a footer with links to various Eikon features and copyright information.

DOCUMENT LISTS

The software web interface presents lists of documents organized by class and life cycle states.

Starting on Release 2.9.5 of the software, users of the web interface – *without having to use folders* - can straightforwardly access all the authorized documents by simply consulting lists constructed by classes and their life cycle states.



Note that the user will only be able to access lists of document classes and states for which the user has access rights.

To access the document list of interest, simply click on the desired link. Clicking the name of a document class, we obtain all authorized documents in that class. By clicking the name of a state what is acquired are only authorized documents in that state.

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[Generate report](#)

DOCUMENT LIST OF CLASS BOOK

Filter [Document name] by

Only last version

24 selected documents, in order of [Class/Name/Version]

Page 1 / 2 (20 page items)

[1](#) [2](#) [Next](#)

	Class	Name	Version	State	Description	Last update
	Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05
	R Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
	Book	FHB-0003		Released	A carta de Pero Vaz de Caminha-Pero Vaz de Caminha	14/05/2010 11:24:45
	Book	FHB-0004		Released	A carta de Mestre João Faras-Mestre João Faras	14/05/2010 11:24:46
	Book	ME-0005		Released	A ALMA ENCANTADORA DAS RUAS-João do Rio	14/05/2010 11:24:46

[Generate report](#)

DOCUMENT LIST OF CLASS BOOK AT STATE RELEASED

Only last version

23 selected documents, in order of [Class/Name/Version]

Page 1 / 2 (20 page items)

[1](#) [2](#) [Next](#)

	Class	Name	Version	State	Description	Last update
	Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05
	R Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
	Book	FHB-0003		Released	A carta de Pero Vaz de Caminha-Pero Vaz de Caminha	14/05/2010 11:24:45
	Book	FHB-0004		Released	A carta de Mestre João Faras-Mestre João Faras	14/05/2010 11:24:46
	Book	ME-		Released	A ALMA ENCANTADORA DAS RUAS-João do Rio	14/05/2010

GENERATING REPORTS

Since Release 2.9.4, Eikon® Documents users can generate reports for later handling and printing. Reports are available on the following formats: HTML and Microsoft® Excel® - XLS. This feature is available for: public folders, private folders, quick searches and user events history and document pages.

To generate reports on the documents linked to a folder, the user can filter the contents of the report based on the following criteria:

- Only the latest or all the available authorized versions of the documents linked to that folder.
- Type: SUMMARY - *only class name, version, status, description and last update* - or COMPLETE - *including also the other attributes of each document*.

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- Filter by state: all states or only a specific state.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Show parameters
Generate report
Up one level

Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05

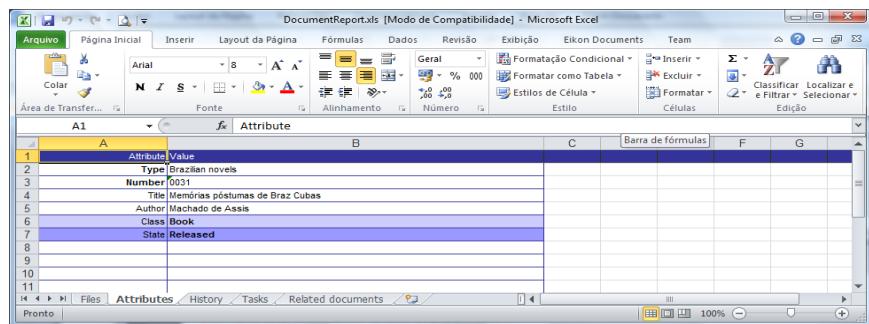
GENERATE REPORT FOR SEARCH [BY AUTHOR - MACHADO DE ASSIS]

Complete and submit the form

Report name: By author - Machado de Assis
 Only last version
 File Type: Excel
 Content Type: Summary only
 Filter by state: Released
 Order by: Class/Name/Version

A	B	C	D	E	F	G	H
1	Class	Name	Version	State	Description	Last update	
2	Book	RB-0006		Released	A carne-Júlio Ribeiro	14/05/2010 11:24:56	
3	Book	RB-0007		Released	O Ateneu-Raul Pompeia	14/05/2010 11:24:47	
4	Book	RB-0008		Released	O Cabeleira-Franklin Távora	14/05/2010 11:24:48	
5	Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49	
6	Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	14/05/2010 11:24:50	
7	Book	RB-0011		Released	Iaí García-Machado de Assis	14/05/2010 11:24:50	
8	Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51	
9	Book	RB-0013		Released	O novigo-Martins Penna	14/05/2010 11:24:51	
10	Book	RB-0014		Released	Aventuras de Diófanes-Terza Margarida da Silva e Orta	14/05/2010 11:24:52	
11	Book	RB-0015		Released	Os Bruxadangas-Lima Barreto	14/05/2010 11:24:52	

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ASSOCIATING DOCUMENTS

Since Release 2.9.4, all authorized Eikon® Documents users can create relationships between any document and other documents previously selected. The prerequisite is that the user should have full permission to the current state of the document being referenced. In the figure below, the user can see if there are any other documents associated to the document that is presented on the screen.

The image contains two screenshots of the Eikon Documents interface.

Screenshot 1: Document Details

URL: [http://www.eikon.com.br/documents/0020](#)

Content:

- Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
- BOOK: RB-0020**
- Files

Name	Type	Size	Reserved
o_cemiterio_dos_vivos.rtf	Formato Rich Text (RTF)	397 kB	
o_cemiterio_dos_vivos.zip	Zip	128 kB	

- Attributes

Class Book
Type Brazilian novels
Number 0020
Title O Cemitério dos Vivos
Author Lima Barreto
State Released

15/04/2011 15:28:06

Screenshot 2: Related Documents

URL: [http://www.eikon.com.br/documents/0020/related](#)

Content:

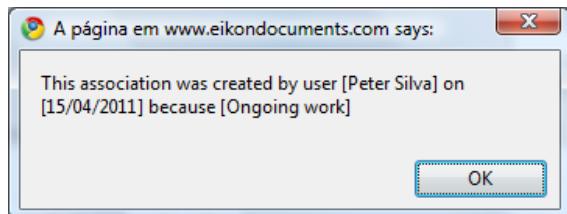
 - Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
 - BOOK: RB-0020 - RELATED DOCUMENTS**
 - There is available one related document

Class	Name	Version	State	Description	Last update
Book	RB-0031	Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	

[Document main page](#)

Eikon Documents 2007 User's Guide

The user can find out the motive behind any particular association by clicking the icon .



3

USING THE WEB INTERFACE

The web interface is the unified access portal to the organization documents through a familiar interface for Web users.

The Eikon[®] Documents standard web interface implements a unified access portal for all organization controlled documents. After the Server software validates her login information, the user initiates her work session accessing her specific work environment, automatically formatted for her.

Eikon[®] Documents WEB user interface can be extended through specific customizations for each ECM/EDM application. For more information about specific implementations, please contact your Application Administrator.

CHOOSING YOUR HOME PAGE

Each user can define which should be her Home Page in Eikon[®] Documents, choosing among Received Tasks, Sent Tasks, History, Publications, Favorites or Lists.

The image below presents a user portal where Received Tasks was set as Home Page.

Eikon Documents 2007 User's Guide

The screenshot shows the 'RECEIVED TASKS' section. At the top, there is a search bar with fields for 'Due from' (10/04/2011), 'until' (24/04/2011), and 'Only not completed' (checked). Below the search bar is a table with one task listed:

1	Due	From	Type	Task	Document	Description	State	Status
1	18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	

At the bottom of the page, there is a footer with links: Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout | Password change | Email change | Home page change | Mudar para Português | User Guide | Links. Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

CHANGING THE INTERFACE IDIOM TO PORTUGUESE

Since Release 2.9.5 of the software any web interface user can choose between English and Portuguese. Just click on the **MUDAR PARA PORTUGUÊS** link on the secondary menu as show in the figure below. After clicking the link, the user must *login* again to see the interface already in the new idiom.

The screenshot shows the same 'RECEIVED TASKS' section as the previous one, but the interface is now in Portuguese. The footer at the bottom includes a link 'Mudar para Português' which is highlighted with a red rectangle.

To change back to English from the Portuguese web interface, just click the link **CHANGE TO ENGLISH**.

PRESENTING THE INTERFACE

Once the software is installed, Eikon® Documents standard Web interface becomes available through intranet or extranet.

CUSTOMIZATION

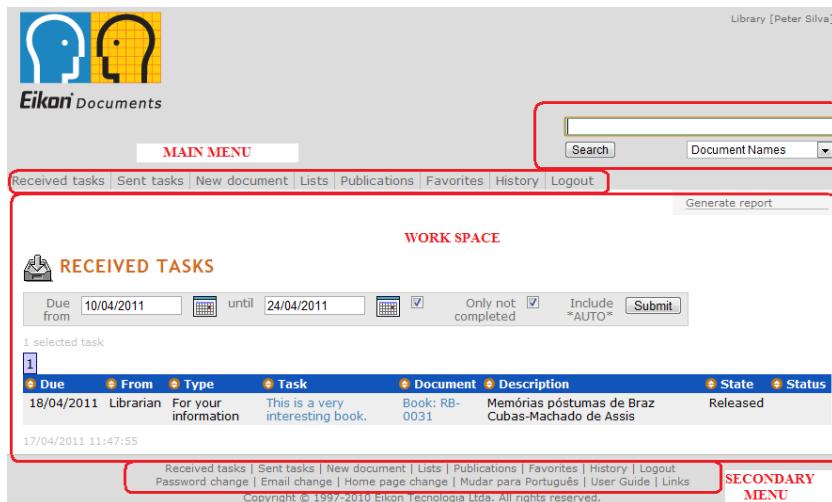
Since release 2.8 of the software, the web interface can be customized in many ways, changing its looks and feel, but preserving its structure and content. Customization can be done either during the software installation, or thereafter.

Specially terms like “public”, “private” ,”static” , “dynamic” and “lists” can be changed for others, more adherent to the company’s business characteristics. In this user guide the following changes were used:

Original term	Term used
Public folders	Publications
Private folders	Favorites
Static folder	Folder
Dynamic folder	Search
Lists	Lists

FORMAT

The portal window is divided in three main areas: main menu, work space and secondary menu.



MAIN MENU

The main menu area has the following options:

- Quick search, file content search (
- Received tasks
- Sent tasks
- Include a new document - *depending on rights and permissions set by the Application Administrator*
- Access to document lists by document class / state
- Access to the public folders structure
- Access to navigation and creation of private folders

- User history
- Close a work session

SECONDARY MENU

The secondary menu area has the following options:

- Preferences settings - *home page, e-mail and password* ,
- *Links* for direct access to web pages chosen by the Administrator,
- Document classes' configuration, file types, user and permission management, catalog import / export - *only if the user is an Application Administrator*.

WORK SPACE

The work space area is used to present lists of documents selected according to the user activities. It may also present the details of a document selected in a prior list, or a form to input or change documents or private folders.

ICONS

The table below presents the standard icons used in the standard web interface and its meaning:

Icon	Meaning
	Private dynamic folder
	Private static folder
	Public dynamic folder



QUICK SEARCH

By typing a simple search **text** string, a user can quickly retrieve all documents that satisfy the following conditions:

- The user has access rights to the document

AND

- The **SEARCH STRING** is contained
 - In documents names

OR

- In documents states names

OR

- In documents descriptions

OR

- In all documents attributes values

OR

- In documents files names

OR

- In all documents metadata.

The search for documents that satisfy the above conditions is run on all existing document classes, respecting the access permissions set for the user running the search. For a quick search, a user must select the kind of desired search and then type the search text string in the box on top of the menu, and finally click the **[Search]** button. See example below:

Eikon Documents 2007 User's Guide

The screenshot shows the Eikon Documents 2007 interface. At the top left is the logo 'Eikon Documents'. At the top right is the text 'Library [Peter Silva]'. Below the logo is a search bar with the placeholder 'Search' and a dropdown menu set to 'All Document Metadata'. A horizontal menu bar includes 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', and 'Logout'. Below the menu is a button labeled 'Generate report'. The main content area has a heading 'QUICK SEARCH FOR [ALENCAR] ON ALL DOCUMENT METADATA' in orange. It says 'Only last version' and '3 selected documents, in order of [Last Update]'. A table lists three documents:

Class	Name	Version	State	Description	Last update
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
Book	RB-0017		Released	Cinco minutos-José de Alencar	14/05/2010 11:24:54
Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51

Below the table is the timestamp '17/04/2011 12:07:02'. At the bottom of the page is a footer with links: Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout | Password change | Email change | Home page change | Mudar para Português | User Guide | Links. It also includes the copyright notice 'Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

FILE CONTENT SEARCH

If this functionality is enabled by the IT area, all users can locate and retrieve documents searching for **SEARCH TEXTS** within the content of searchable document files.

Searchable files, usually, are text based content files, such as PDF and Microsoft® Office® created files. For more details, please contact your IT area.

Only documents that the user has access permission are retrievable.

To search by file content, just type the **SEARCH STRING**, select the *File Contents* option and click **Search**. Search doesn't differentiate capitalized letters. No language specific signs or special accents are considered.

The screenshot shows the Eikon Documents 2007 interface. At the top left is the logo 'Eikon Documents'. At the top right is the text 'Library [Peter Silva]'. Below the logo is a search bar with the placeholder 'Search' and a dropdown menu set to 'File Contents'. A red box highlights the search bar and dropdown menu. A horizontal menu bar includes 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', and 'Logout'. Below the menu is a button labeled 'Generate report'.

Files that contain the search string will be listed, **RANK-ORDERED**, with a direct link to the document's main page. Rank is established by Windows® indexing engine, and basically includes how many times the search string was found within the file.

SEARCH BY CONTENT [PALMEIRAS]							
6 selected files ordered by rank.							
Class	Name	Version	State	Description	Rank	File	Size
Book	RB-0021		Released	Iracema-José de Alencar	6	IRACEMA.pdf	404 kB
Book	RB-0006		Released	A carne-Júlio Ribeiro	1	ACARNE.pdf	378 kB
Book	RB-0021		Released	Iracema-José de Alencar	1	iracema.rtf	296 kB
Book	RB-0010		Released	Memórias Póstumas de Brás Cubas-Machado de Assis	0	brascubas.pdf	401 kB
Book	RB-0008		Released	O Cabeleira-Franklin Távora	0	o_cabeleira.pdf	374 kB
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	0	o_cemiterio_dos_vivos.rtf	397 kB

TASKS

Tasks are always associated to a specific document. To send one or more tasks, the user must first locate the document which the tasks refer to.

SENDING TASKS

To send one or more tasks, click SEND TASKS near the icon in the document specific command menu.

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0020

Files			
Name	Type	Size	Reserved
o_cemiterio_dos_vivos.rtf	Formato Rich Text (RTF)	397 kB	
o_cemiterio_dos_vivos.zip	Zip	128 kB	

Attributes	
Class	Book
Type	Brazilian novels
Number	0020
Title	O Cemitério dos Vivos
Author	Lima Barreto
State	Released

Send tasks

- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report

Fill in and submit the form, clicking the **SUBMIT** button. See example below:

BOOK: RB-0020 - SEND TASKS

Enter new tasks data

Type: For your information

Notify by email:

Due: 18/04/2011

Is there any new edition of this book?

Task description:

Librarian [Administrador]
 Peter Silva [Enterprise]
 Thomaz Ayres [Bibliotecario]

[Document main page](#)

Tasks will be included in the database, and, if E-MAIL NOTIFICATION box is checked, e-mail messages will be sent after the user clicks *Submit*.

BOOK: RB-0020 - TASKS

2 selected tasks

From	To	Type	Created in	Due	Completed in	Task description	Task email	Status	Response	Response email
Peter Silva	Thomaz Ayres	For your information	17/04/2011	18/04/2011		Is there any new edition of this book?	Yes	-	No	
Peter Silva	Librarian	For your information	17/04/2011	18/04/2011		Is there any new edition of this book?	Yes	-	No	

[Document main page](#)

CHECKING SENT TASKS

To check sent tasks status, please click on the **SENT TASKS** menu. If the due date of a specific task is prior to today, this task will be marked as *Delayed*.

User can click on the tasks table titles to reorder the task list in ascending or descending order. Clicking on the task description text presents the task page. Clicking the document title – *class/name/version*, presents the document page.

Due	To	Type	Task	Document	Description	State	Status
10/04/2011	Librarian	For your information	Is there any new edition of this book?	Book: RB-0020	O Cemitério dos Vivos-Lima Barreto	Released	
18/04/2011	Thomaz Ayres	For your information	Is there any new edition of this book?	Book: RB-0020	O Cemitério dos Vivos-Lima Barreto	Released	

TASK

From	Peter Silva
To	Librarian
Type	For your information
Created in	17/04/2011 12:34:25
Due	18/04/2011
Completed in	
Status	
Task description	Is there any new edition of this book?
Task email	Yes
Response	-
Response email	No
Document	Book RB-0020 O Cemitério dos Vivos-Lima Barreto

[Cancel](#)

CANCELLING A TASK

The sender of a task can cancel it only if the recipient has not yet posted a reply.

RECEIVING TASKS

The received tasks list may be accessed by clicking the menu **RECEIVED TASKS**. Please note that, at the beginning of every work session, the received tasks list is automatically presented in the portal's work space area, unless the user has chosen a different *Home Page*.

The screenshot shows the 'RECEIVED TASKS' page. At the top, there is a navigation bar with links: Received tasks (highlighted with a red box), Sent tasks, New document, Lists, Publications, Favorites, History, and Logout. To the right of the navigation bar are search fields for 'Search' and 'Document Names' with a dropdown arrow, and a 'Generate report' button.

The main area is titled 'RECEIVED TASKS' with a hand icon. It features a search/filter bar below the title with fields for 'Due from' (10/04/2011), 'until' (24/04/2011), 'Only not completed' (checkbox checked), 'Include >AUTO<' (radio button selected), and a 'Submit' button. Below the filter bar, it says '1 selected task'.

A table lists one task:

1	Due	From	Type	Task	Document	Description	State	Status
1	18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	Released

At the bottom of the page, there is a timestamp '17/04/2011 12:43:25' and a footer with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, Logout, Password change, Email change, Home page change, Mudar para Português, User Guide, and Links. The footer also includes a copyright notice: Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

To access details of a received task, click on the corresponding description text. To access the document which the task refers to, click on the text identifying it.

REGISTERING THAT A TASK HAS BEEN COMPLETED

The task recipient, once concluding the designed task, shall click on **SUBMIT** button to inform the task sender. If the box *Notify by e-mail* check-box has been marked, the task sender will also receive an e-mail notification.

The task recipient might not accept the task. Just select the option *Task not accepted* and click the **SUBMIT** button, and the task sender will be notified.

The task recipient should also include a comment when registering that the task has been completed.

In case the document, for whatsoever reason, is no longer available for access by the task recipient, select the option *Document unavailable* and click the **SUBMIT** button to notify the task sender.

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TASK

From	Librarian
To	Peter Silva
Type	For your information
Created in	17/04/2011 11:44:22
Due	18/04/2011
Completed in	
Status	
Task description	This is a very interesting book.
Task email	Yes
Response	-
Response email	No
Document	Book RB-0031 Memórias póstumas de Braz Cubas-Machado de Assis

Please enter the task response and submit

Status: Task completed

Notify by email

Response:

Thank you for the tip. I will read it as soon as possible.

SEARCHING AND RETRIEVING PUBLISHED DOCUMENTS

Published documents are documents linked to static or dynamic public folders.

Publishing in static public folders may be temporary or permanent. Publishing a document in static or dynamic public folders depends on a prior *enabling*, by the Application Administrator, of the operational procedure **PUBLICATION** for the current state of each linked document.

LINKING DOCUMENTS to public dynamic folders is done automatically, through the match between the dynamic folder search parameters and the documents attributes.

Locating documents linked to public folders is done navigating the public folders hierarchy, which is defined and set by the Application Administrator.

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To begin to navigate in the public folders hierarchy, click on the menu option **PUBLIC FOLDERS**¹. Click the listed folders names; you may expand or compress the public folders structure.

The screenshot shows the Eikon Documents 2007 interface. At the top, there are two icons: a blue one with a white brain-like shape and a yellow one with a grid pattern. Below them is the text "Eikon Documents". On the right, it says "Library [Peter Silva]". A search bar with a "Search" button and a dropdown menu labeled "Document Names" are also present. Below the search bar is a navigation menu with links: Received tasks, Sent tasks, New document, Lists, Publications (which is highlighted with a red box), Favorites, History, and Logout. The main content area is titled "PUBLICATIONS". It shows a tree view of folders: Library > By author > By type >. Under "By type", there are three items: Book: Brazilian novels, Book: Brazilian tales, and Book: Other. The "Book: Other" folder is expanded, showing a sub-folder "New books" which is also highlighted with a red box. Other collapsed categories include Manufacturing, Marketing, and Planning. At the bottom left, the date and time are shown as "17/04/2011 12:50:11". At the bottom right, there are links for Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, and Logout, along with copyright information: "Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved."

Clicking the public folder name presents the list of documents linked to it. However, if this folder has sub-folders, the symbol **>** - presented just next to the folder name - shall be clicked to present the list of linked documents.

The screenshot shows the list of documents under the "New books" folder. At the top, there is a header with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, and Logout. To the right are three buttons: "Mark Folder", "Generate report", and "Up one level". The main content area is titled "NEW BOOKS" and shows a table of 2 selected documents. The columns are: Class, Name, Version, State, Description, and Last update. The data is as follows:

Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55

Please note that this list will contain only the documents to which the user has access rights to.

¹ Please note the settings in the examples: **PUBLICATIONS** substitutes the default term **PUBLIC FOLDERS**, **FOLDER** substitutes **STATIC** and **SEARCH** substitutes **DYNAMIC**.

SEARCHING FOR DOCUMENTS

Searching for documents means to locate documents that satisfy user-set search criteria.

First, the **DOCUMENT CLASS** to be searched must be set. This corresponds to pick a class that will be subject to the new search. To create a new private dynamic folder, the user *must click on the document class name* in the work space area.



This will present, in the work space area, a form to be filled in and sent.

ADD SEARCH IN CLASS [BOOK]

Please, enter Search's parameters and name

Attribute Operation		Value
Or	And	Type Equal to <input type="text" value="Brazilian tales"/>
Or	And	Number Contains <input type="text"/>
Or	And	Title Contains <input type="text"/>
Or	And	Author Contains <input type="text"/>

[Type] Equal to [Brazilian tales]

Search Parameters

Name

The following image presents the results of *opening* of the just created private dynamic folder.

The screenshot shows a search interface for 'BOOK: BRAZILIAN TALES'. At the top, there are navigation links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, and Logout. On the right, there is a menu with options: Show parameters, Change parameters, Delete Search, and Generate report. The main area displays a table with two rows of search results:

Class	Name	Version	State	Description	Last update
Book	CB-0002		Released	Nova Califórnia-Lima Barreto	08/04/2011 10:56:52
Book	CB-0001		Released	O Alienista-Machado de Assis	15/12/2010 09:55:05

FORM TO CREATE A NEW DYNAMIC PRIVATE FOLDER

To create a new dynamic folder you must define a name and the search criteria for it. Once created, documents that satisfy the search criteria will be automatically listed *every time the folder is opened*. You may, anytime, repeat the search for documents that satisfy the search criteria just by clicking the desired folder name in the menu.

To set each search criteria, follow this procedure:

1. In the line corresponding to the chosen attribute, select the desired **OPERATION**, among options available.
2. In the line corresponding to the chosen attribute, set the desired attribute **VALUE**.
3. In the line corresponding to the chosen attribute, click the **OR** or **AND** buttons to add the new parameter to the search criteria.

Search criteria will be updated by your browser reflecting your input. Click on **CLEAR** to re-initiate the whole process again.

When you conclude the search criteria definition, just inform a text to identify the new folder and click the **SUBMIT** button.

AVAILABLE OPERATIONS

<i>Operation</i>	<i>Meaning</i>
Equal to	Attribute value must be equal to criteria
Different from	Attribute value must be different from criteria
Begins with	Attribute value must begin with criteria
Contains	Criteria must be contained within attribute value
Greater than	Attribute value must be greater than criteria
Less than	Attribute value must be less than criteria
Greater or equal	Attribute value must be greater than or equal criteria
Less or equal	Attribute value must be less than or equal criteria

See the following example:

ADD SEARCH IN CLASS [BOOK]

Please, enter Search's parameters and name

<input type="button" value="Or"/> <input type="button" value="And"/> <input type="button" value="Or"/> <input type="button" value="And"/> <input type="button" value="Or"/> <input type="button" value="And"/> <input type="button" value="Or"/> <input type="button" value="And"/>	<table border="0"> <tr> <td>Attribute Operation</td> <td>Value</td> </tr> <tr> <td>Type</td> <td>Equal to <input type="text" value="Brazilian novels"/></td> </tr> <tr> <td>Number</td> <td>Contains <input type="text"/></td> </tr> <tr> <td>Title</td> <td>Contains <input type="text"/></td> </tr> <tr> <td>Author</td> <td>Equal to <input type="text" value="Lima Barreto"/></td> </tr> </table>	Attribute Operation	Value	Type	Equal to <input type="text" value="Brazilian novels"/>	Number	Contains <input type="text"/>	Title	Contains <input type="text"/>	Author	Equal to <input type="text" value="Lima Barreto"/>
Attribute Operation	Value										
Type	Equal to <input type="text" value="Brazilian novels"/>										
Number	Contains <input type="text"/>										
Title	Contains <input type="text"/>										
Author	Equal to <input type="text" value="Lima Barreto"/>										
<p>Search Parameters</p> <pre>[Type] Equal to [Brazilian novels] And [Author] Equal to [Machado de Assis] Or [Type] Equal to [Brazilian novels] And [Author] Equal to [Lima Barreto]</pre>											
Name <input type="text" value="Novels of Machado de Assis and Lima Barreto"/>											
<input type="button" value="Submit"/> <input type="button" value="Clear"/>											

CREATING AND MAINTAINING PRIVATE STATIC FOLDERS

Private static folders contain shortcuts to those documents used more frequently, bringing together different document classes, grouped by topics of interest.

After adding a new static private folder, the user can link the documents of interest. The same document can be linked to more than one folder, as well as one or more static public folders.

ADDING A NEW STATIC PRIVATE FOLDER

To add a new static folder, the user must click on the **FAVORITES** menu and, then, click on the **ADD NEW FOLDER** on the work space.

The screenshot shows the Eikon Documents 2007 application window. At the top, there is a logo with two stylized human heads, one blue and one yellow, and the text "Eikon' Documents". The top right corner displays "Library [Peter Silva]". Below the logo, there is a navigation bar with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites (which is highlighted with a red box), History, and Logout. To the right of the navigation bar is a search bar labeled "Search" and a dropdown menu labeled "Document Names". Further down on the right is a toolbar with buttons for "Add new Folder" (highlighted with a red box), "Add new Search in", and "Book". The main content area is titled "FAVORITES" in orange. It contains a table with three rows:

Type	Class	Name
Folder		Ongoing work
Book		Brazilian tales
Book		Novels of Machado de Assis and Lima Barreto

At the bottom of the screen, there is a footer bar with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History, Logout, Password change, Email change, Home page change, Mudar para Português, User Guide, and Links. The footer also includes copyright information: Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.

Eikon Documents 2007 User's Guide

A form requiring the name of the new private static folder will show up and, if desired, the folder **CAN BE MARKED** for future documents linking.

The screenshot shows the Eikon Documents 2007 user interface. At the top, there is a 'Complete and submit the form' dialog with fields for 'Name' (containing 'If you liked this, see also...') and 'Mark as recipient' (with a checked checkbox). Below this is a 'Submit' button. The main workspace shows the 'Eikon Documents' logo and a 'Library [Peter Silva]' header. A search bar contains 'If you liked this, see also...'. Below the search bar are links for 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', and 'Logout'. On the right, there is a sidebar with options like 'Add new Folder', 'Add new Search in Book', and 'Book'. The 'FAVORITES' section lists items categorized by type (Type) and class (Class). The items listed are:

Type	Class	Name
File	Folder	If you liked this, see also...
File		Ongoing work
Image	Book	Brazilian tales
Image	Book	Novels of Machado de Assis and Lima Barreto

At the bottom of the workspace, there is a footer with links for 'Received tasks', 'Sent tasks', 'New document', 'Lists', 'Publications', 'Favorites', 'History', 'Logout', 'Password change', 'Email change', 'Home page change', 'Mudar para Português', 'User Guide', and 'Links'. It also includes a copyright notice: 'Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

MARKING A STATIC PRIVATE FOLDER

To mark a static private folder is to inform the software that the subsequent documents links will be done to the marked folder.

In addition all documents inserted after the marking will be automatically linked to the marked folder. The mark is valid only during the current work session. While the folder remains marked it will be displayed in the main menu.

Note: all documents that are linked to a selected folder are available to be associated to other documents.

To mark a folder, the user must open the folder and then click **MARK FOLDER** next to icon on the work space.

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

ONGOING WORK
2 selected documents, in order of [Class/Name/Version]

Class	Name	Version	State	Description	Last update
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

Mark Folder
Change Folder
Delete Folder
Generate report

See the result of marking the folder from the previous example when updating the page.

Library [Peter Silva]

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

ONGOING WORK
2 selected documents, in order of [Class/Name/Version]

Class	Name	Version	State	Description	Last update
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

Unmark Folder
Generate report

17/04/2011 13:21:45

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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LINKING A DOCUMENT TO THE MARKED FOLDER

A document is linked to the last marked private static folder, by clicking on **LINK DOCUMENT** next to the icon located in the area of specific document commands.

BOOK: RB-0012

Files			
Name	Type	Size	Reserved
gazela.rtf	Documento do Microsoft Word	260 kB	
gazela.zip	Zip	88 kB	

Attributes

Class Book
Type Brazilian novels
Number 0012
Title A pata da gazela
Author José de Alencar
State Released

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report

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The user may check the linking of the document to the folder by visiting the static private folder page indicated over the main menu.



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Unmark Folder
Generate report

ONGOING WORK

3 selected documents, in order of [Class/Name/Version]

Class	Name	Version	State	Description	Last update	Action
Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51	X
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	X
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	X

DELETING THE LINK BETWEEN A DOCUMENT AND A FOLDER

To delete the link of any document to a private static folder, open the chosen folder and click the icon  located on line of any document whose link should be deleted. See the previous example.

DELETING A PRIVATE FOLDER

To delete a static private folder the user should click on **DELETE FOLDER** next to the icon  located in the specific folder commands. The folder will be deleted immediately. The documents linked above are not affected.

Note that only unmarked folders can be deleted.



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

Mark Folder
Change Folder
Delete Folder
Generate report

ONGOING WORK

3 selected documents, in order of [Class/Name/Version]

Class	Name	Version	State	Description	Last update	Action
Book	RB-0012		Released	A pata da gazela-José de Alencar	14/05/2010 11:24:51	X
Book	RB-0020		Released	O Cemitério dos Vivos-Lima Barreto	14/05/2010 11:24:55	X
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01	X

USING STATIC PRIVATE FOLDERS TO CREATE ASSOCIATIONS BETWEEN DOCUMENTS

The static private folders are also used to create associations between documents, using the web standard interface. The documents linked to the **MARKED** private static folder are available, at any time, to be associated to the document presented on the screen.

ASSOCIATING DOCUMENTS

Authorized users can associate any document to other documents of interest. This enables the establishment of a chain of relationships that enriches and facilitates the understanding of the organization operations, businesses, products, processes, etc.

INSERTION OF ASSOCIATIONS

The process of creating associations in the standard web interface involves three steps:

1. Insertion and marking of a new private static folder - *an existing folder can also be marked.*
2. Linking one or more documents to the previously marked folder.
3. Associating a chosen document to the documents linked to the previously marked folder.

EXAMPLE OF ASSOCIATION BETWEEN "TWO BOOKS"

To help to clarify the procedure for establishing relationships let's use the following example. A reader of books, Mr. Peter da Silva, would like to recommend another book for users who eventually enjoyed reading the book "Memórias Póstumas de Braz Cubas". He must do the following:

1. Insertion and marking of a new private static folder by the name "If you liked this, also read..."

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2. Retrieving the document with the book to be recommended – ASSOCIATED – and linking it to the folder
3. Retrieving the document that will be associated
4. Insertion of the association

The step by step procedure is illustrated in the following images.

ADD NEW FOLDER

Complete and submit the form

Name

Mark as recipient

Submit

FAVORITES

Type	Class	Name
File		If you liked this, see also...
Folder		Ongoing work
Image	Book	Brazilian tales
Image	Book	Novels of Machado de Assis and Lima Barreto

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

17/04/2011 13:16:40

Library [Peter Silva]

If you liked this, see also...

Search Document Names

Add new Folder
Add new Search in Book

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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 Library [Peter Silva]

If you liked this, see also...

Search All Document Metadata

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0009

Files			
Name	Type	Size	Reserved
 dom_casmurro.rtf	Documento do Microsoft Word	701 kB	
 dom_casmurro.zip	Zip	179 kB	

Attributes			
Class	Book		
Type	Brazilian novels		
Number	0009		
Title	Dom Casmurro		
Author	Machado de Assis		
State	Released		

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report

Unmark Folder
Generate report

 IF YOU LIKED THIS, SEE ALSO... 

1 selected document

Class	Name	Version	State	Description	Last update
 Book	RB-0009		Released	Dom Casmurro-Machado de Assis	14/05/2010 11:24:49 

Generate report

QUICK SEARCH FOR [BRAZ CUBAS] ON ALL DOCUMENT METADATA

Only last version

1 selected document

Class	Name	Version	State	Description	Last update
 Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01 

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report
My task

 Library [Peter Silva]

If you liked this, see also...

Search All Document Metadata

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0031

Files			
Name	Type	Size	Reserved
 Memórias Póstumas de Braz Cubas.pdf	Adobe Acrobat Document	413 kB	

Attributes			
Class	Book		
Type	Brazilian novels		
Number	0031		
Title	Memórias póstumas de Braz Cubas		
Author	Machado de Assis		
State	Released		

Send tasks
Link document
Associate document
Show publications
Show related documents
Show history
Show tasks
Generate report
My task

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BOOK: RB-0031 - RELATED DOCUMENTS

There is available one related document

Class	Name	Version	State	Description	Last update	
Book	RB-0009	Released		Dom Casmurro-Machado de Assis	14/05/2010 11:24:49	 

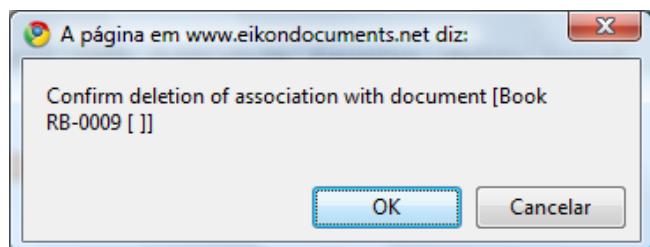
[Document main page](#)



Note: Only users who have full permission can insert and delete relationships.

DELETING AN ASSOCIATION

To delete a relationship, click on the icon  and confirm.



ADDING A NEW DOCUMENT

To add a new document, the user must click on **NEW DOCUMENT** on the main menu, and then decide to which class the new document should belong to and in what state of the class lifecycle the document should be included.

The available options are displayed on the work space. See example below.

The screenshot shows the Eikon Documents 2007 interface. At the top, there is a logo for 'Eikon' and the text 'Eikon Documents'. The top navigation bar includes links for 'Received tasks', 'Sent tasks', 'New document' (which is highlighted with a red box), 'Lists', 'Publications', 'Favorites', 'History', and 'Logout'. On the right side of the header, there is a search bar labeled 'Search' and a dropdown menu labeled 'Document Names'. Below the header, the main content area has a title 'ADD BOOK [REGISTERING]'. Underneath the title is a form titled 'Complete and submit the form'. The form fields include: 'Type' (set to 'Brazilian history founders'), 'Number (auto)', 'Title' (empty), and 'Author' (empty). At the bottom of the form are 'Submit' and 'Clear' buttons. To the right of the form, there is a small box with the text 'Add new' and 'Projeto Executivo [Listado]', also highlighted with a red box. At the very bottom of the page, there is a footer with the date '17/04/2011 13:56:55' and links for 'Received tasks', 'Sent tasks', 'New document' (highlighted with a red box), 'Lists', 'Publications', 'Favorites', 'History', and 'Logout'. The footer also includes copyright information: 'Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout', 'Password change | Email change | Home page change | Mudar para Português | User Guide | Links', and 'Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved.'

This screenshot shows another part of the Eikon Documents 2007 interface. It features a similar layout with a top navigation bar and a main content area. The main content area has a title 'ADD PROJETO EXECUTIVO [LISTADO]'. Below the title is a form titled 'Complete and submit the form'. The form fields include: 'Tipo' (set to 'Folha de Dados'), 'Instalação' (set to 'Ribeirão Preto'), 'Área de atividade' (set to 'Tancagem de álcool'), and 'Classe de serviço' (set to '100-CONSTRUÇÃO CIVIL, ARQUITETURA & URBANISMO'). To the right of the form, there is a small box with the text 'Add new' and 'Book [Registering]', also highlighted with a red box. The footer at the bottom of the page is identical to the one in the previous screenshot.

FORM FOR INSERTION OF A NEW DOCUMENT

Fill in the form with the attributes values that characterize the new document.

- If an asterisk * is displayed on the right of the name of an attribute, the user can select multiple values for this attribute - use [CTRL] + [SHIFT].
- Use the **CLEAR** button to reset the form.
- Use the **SUBMIT** button to send the informed values to the server.

ADD BOOK [REGISTERING]

Complete and submit the form

Type: Brazilian novels

Number: {auto}

Title: Aventuras de Diófanes

Author: Teresa Margarida de Silva e Orta

Submit Clear

After clicking the **SUBMIT** button, the server will confirm the insertion of the new document showing the just included document page. Thereafter, the user can add content to the document, change the values of their attributes or perform other activities.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Name	Type	Size	Reserved
Attributes			
Class Book			
Type	Brazilian novels		
Number	0032		
Title	Aventuras de Diófanes		
Author	Teresa Margarida de Silva e Orta		
State Registering			

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report
Add content
Change attributes
Delete document
Release

ADDING A NEW VERSION OF AN EXISTING DOCUMENT

Certain classes, at the discretion of the Application Administrator, may support multiple versions of documents. Under this condition, a user who possesses the **FULL** permission type for the current state of a document can easily create a new version.

Eikon Documents 2007 User's Guide

Click on **ADD NEW VERSION** on the specific document commands menu and fill in and submit the resulting form.

The screenshot shows a document details page for 'CR-4450.74-6521-862-RKO-001'. The document type is 'PDF Document' with a size of '544 kB'. The context menu on the right includes options like 'Send tasks', 'Show publications', 'Show related documents', 'Show other versions', 'Show history', 'Show tasks', 'Add new version' (which is highlighted with a red box), 'Generate report', 'Add content', 'Change attributes', 'Register change from Approved with comments*', and 'Voltar'.

During the filling of the form, the user must fill new values on the attributes of type *version – labels in italics*. Optionally, other attribute's values can be modified and the contents of the previous version can be copied - **CLONING OF FILES**.

The screenshot shows the 'ADD NEW VERSION FOR DED: CR-4450.74-6521-862-RKO-001 [0]' form. It includes fields for 'Idiom' (Portuguese), 'Type' (CR-Cronograma / Schedule), 'Installation area' (4450.74-Gasoduto Cacimbas - Catu), 'System number' (6521-Gasoduto), 'Class of service' (862-PLC), 'Originator code' (RKO - ROCKWELL), 'Sequential number' (001), 'Revision' (A), 'Status' (Para comentários / For comments), 'Discipline' (Instrumentação / Instrumentation), and 'Document title' (Cronograma de Montagem e Fabricação / Assembly and Manufacturing schedule). A 'State' dropdown is set to 'Listed' with the 'Copy content' checkbox checked.

After clicking on the **SUBMIT** button the records corresponding to the new document will be created and the new document version page will be presented.

ADDING CONTENT TO A DOCUMENT

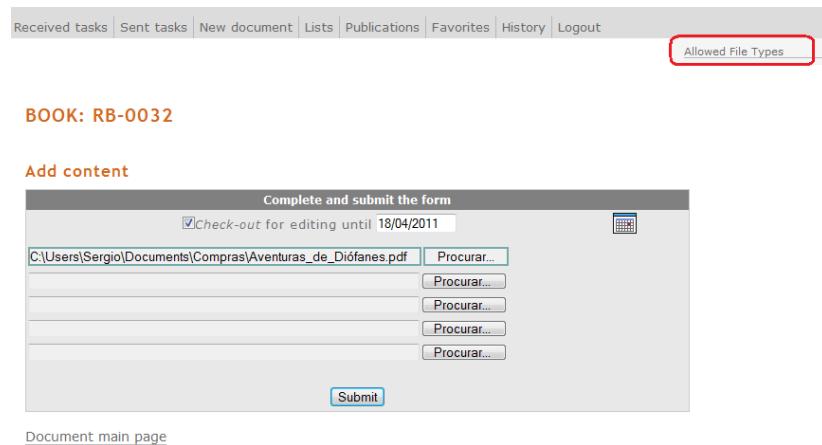
Adding content to a document means adding one or more files at the same time. This feature is only available for documents whose state in its life cycle allows **EDITING** and only to users with **FULL** permission.

To add one or more files click **ADD CONTENT** to the right side of the icon  located in the specific document commands area.



The screenshot shows a document details page for 'BOOK: RB-0032'. On the right, a vertical menu lists various document actions. The 'Add content' option, which is represented by a document icon followed by the text 'Add content', is highlighted with a red rectangle.

After executing the command, the portal will display a form like this one.



The screenshot shows the 'Add content' form. At the top, it says 'Complete and submit the form'. Below that is a checkbox labeled 'Check-out for editing until 18/04/2011' with a calendar icon. There is a text input field containing the path 'C:\Users\Sergio\Documents\Compras\Aventuras_de_Diófanes.pdf' and a 'Procurar...' button. Below this are four empty file upload fields, each with a 'Procurar...' button. At the bottom is a 'Submit' button.

[Document main page](#)

ALLOWED FILE TYPES

Clicking on the command **ALLOWED FILE TYPES** the portal will display a list of allowed file types, as the following example.

ALLOWED FILE TYPES

Type	Extension	Content type (MIME)
Adobe Acrobat Document	.pdf	application/pdf
Arquivo texto	.txt	text/plain
Autocad DWF	.dwf	drawing/x-dwf
AutoCAD.Drawing	.dwg	image/vnd.dwg
Documento de imagem TIF	.tif	image/tif
Documento do Microsoft Word	.doc	application/msword
Excel	.xlsx	Application/xlsx
Formato Rich Text (RTF)	.rtf	text/richtext
Imagen GIF	.gif	image/gif
Imagen JPEG	.jpg	image/jpg
Internet E-Mail Message	.eml	message/rfc822
Planilha de Excel	.xls	Application/XLS
Planilha do Microsoft Excel	.xls	application/vnd.ms-excel
Word 2007	.docx	application/vnd.openxmlformats-officedocument.wordprocessingml.document
Zip	.zip	application/x-zip-compressed
Zip File	.zip	application/x-zip-compressed

FILE UPLOAD

Click on [Browse ...] or equivalent and locate the file you wish to add to the document. The user can only choose allowed file types. This form allows you to add multiple files at once – *up to five files*.

Mark the check-box **CHECK-OUT FOR EDITING UNTIL** and inform the target date if the user decides to already check-out the file to be uploaded.

To upload the selected files click on the **SUBMIT** button. This may take some time as the uploading time depends on the size of the file(s) and on the connection bandwidth. *It is recommended that you wait for the completion of the operation before doing any other activity on the browser.*

The document's page will be refreshed when the upload operation is completed.

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The screenshot shows a document details page for 'BOOK: RB-0032'. The main area displays the document's attributes:

Name	Type	Size	Reserved
Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	

Below the table, there is an 'Attributes' section with the following fields:

Class Book
Type Brazilian novels
Number 0032
Title Aventuras de Diófanes
Author Teresa Margarida de Silva e Orta
State Registering

To the right of the main content is a vertical toolbar with the following options:

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes

MODIFYING THE CONTENTS OF A DOCUMENT

The contents of a document may be modified by performing the following tasks:

- Check-out a file for editing
- Cancel the check-out
- Replacement of the checked-out file - *check-in*
- File deletion

These features are available only to authorized users and documents whose **STATE** in their life cycle allows them to be edited.

FILE REPLACEMENT - CHECK-OUT

On the document page click on the icon at the right side of the name of the file that will be replaced to start the check-out procedure.

The screenshot shows the same document details page for 'BOOK: RB-0032'. A red arrow points to the 'Check-out button' (represented by a pencil icon) located at the right end of the row for the file 'Aventuras_de_Diófanes.pdf'. To the right of the main content is a vertical toolbar with the following options:

- Send tasks
- Show publications
- Show related documents
- Show history
- Show tasks
- Generate report
- Add content
- Change attributes
- Delete document** (highlighted with a yellow arrow)
- Release

After clicking on the icon, the portal will ask for an expected file's *check-in* date, as the following example.



After the submission of the check-in estimated date, the document's page will be refreshed.

Note that as long as there are any checked-out files, the document cannot change state or be deleted.

The screenshot shows a list of files under "BOOK: RB-0032". A file named "Aventuras_de_Diófanes.pdf" is selected. To its right, there is a "Cancel check-out button" (red X) and a "Check-in button" (blue checkmark). A context menu on the right side of the screen includes options like "Send tasks", "Show publications", and "Change attributes".

CANCELLING A FILE CHECK-OUT

Click on the icon at the right side of the checked-out file name, such as the above example. The check-out will be immediately cancelled.

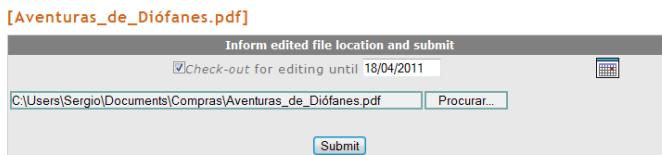
Note that the user cannot cancel the file check-out performed by other users.

REPLACING THE CHECKED-OUT FILE

To perform a file check-in, click on the icon at the right side of the checked-out file, following the previous example. The user may now browse and submit the file replacement on the displayed form.

Note that a user cannot replace - check-in - another user's checked-out file.

BOOK: RB-0032



After submitting the file replacement, the existing *check-out* will be automatically canceled, unless that on the replacement form the user has entered a new check-out target date.

RECOVERING ANY PREVIOUS INSTANCE OF A FILE

When a file is replaced by a newer one through the CHECK-OUT AND CHECK-IN PROCESS, the server software does not eliminate any file instance from the repository. To start the recovery process of the previous file instance, click on the command **SHOW HISTORY** located in the document's specific commands workspace.

BOOK: RB-0032

Files				
Name	Type	Size	Reserved	
R Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kB	<input checked="" type="checkbox"/> Peter Silva	<input type="button" value="Check-in"/> <input type="button" value="Delete"/> X

Attributes

Class: Book
Type: Brazilian novels
Number: 0032
Title: Aventuras de Diófanes

- Send tasks
- Show publications
- Show related documents
- Show history**
- Show tasks
- Generate report
- Add content
- Change attributes

After the presentation of the document's events history, find the file replacement of interest and click on the file name. The previously replaced file download process will start immediately.

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Click on the replaced file name to recover this file instance

BOOK: RB-0032 - HISTORY

Added by	Added in	Last updated by	Last updated
Peter Silva	17/04/2011 14:16:37	Peter Silva	17/04/2011 14:56:33

Events occurring from 10/04/2011 until 17/04/2011

7 events occurred in the period

User	State	File	Event	Date/Time
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File replaced	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:51:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	Check-out canceled	17/04/2011 14:46:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:43:54
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File added	17/04/2011 14:43:54
Peter Silva	Registering		Document added	17/04/2011 14:16:37

[Document main page](#)

EDITING THE FILE NAME

Click on the icon  located just to the right side of the file name to be changed.

Note that a user cannot change name of files checked-out by other users.

Click this button to rename the file

BOOK: RB-0032

Name	Type	Size	Reserved
 Aventuras_de_Diófanes.pdf	Adobe Acrobat Document	39 kb	<input checked="" type="checkbox"/> Peter Silva 18/04/2011  

Attributes

Class Book
Type Brazilian novels
Number 0032

 Send tasks
 Show publications
 Show related documents
 Show history
 Show tasks
 Generate report
 Add content
 Change attributes

Fill in the displayed form to change the filename.

BOOK: RB-0032

[Aventuras_de_Diófanes.pdf]

New file name

DELETING A FILE

Click on the icon  at the right side on the line of the file that is going to be deleted.

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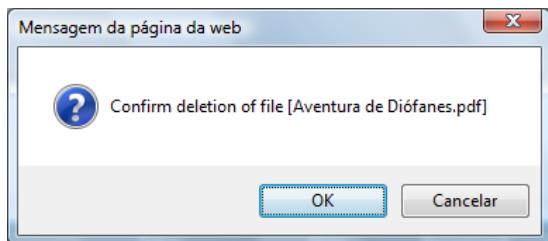
The screenshot shows a file list titled "BOOK: RB-0032". A red arrow points from the text "Click this icon to delete the file" to the "Delete" icon (a red X) in the context menu, which is open over the file "Aventura de Diófanes.pdf". The context menu also includes options like "Send tasks", "Show publications", and "Change attributes".

Name	Type	Size	Reserved
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB	<input checked="" type="checkbox"/> Peter Silva 18/04/2011

Attributes

Class Book
Type Brazilian novels

The file will be deleted after confirmation.



Note that a user cannot delete files checked-out by other users.

EDITING THE DOCUMENT ATTRIBUTES

Click on **CHANGE ATTRIBUTES** on the left side of the icon  located at the document's page command area to start the procedure for changing the values of attributes of the document by submitting a form.

This feature is only available for documents whose status in their life cycle allows editing and, of course, only to authorized users.

Values of attributes that ARE PART OF THE DOCUMENT NAME OR DOCUMENT VERSION cannot be changed and are not presented on the attributes editing form.

See the following example:

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files				
Name	Type	Size	Reserved	
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB		

Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Aventuras de Diófanes
Author	Teresa Margarida de Silva e Orta
State	Registering

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report
 Add content
 Change attributes (highlighted with a red box)
 Delete document
 Release

BOOK: RB-0032 - CHANGE ATTRIBUTES

Complete and submit the form

Title:	<input type="text" value="Diophanes adventures"/>
Author:	<input type="text" value="Teresa Margarida de Silva e Orta"/>

[Document main page](#)

CHANGING THE DOCUMENT STATE

This feature is only available to users who have full permission, provided that the document does not have any checked-out file.

Click the text corresponding to the desired **DOCUMENT TRANSITION STATE ACTION**. The texts with the names of the available actions are presented at the document's page command area on the right side of icons.

See the example below.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files				
Name	Type	Size	Reserved	
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB		

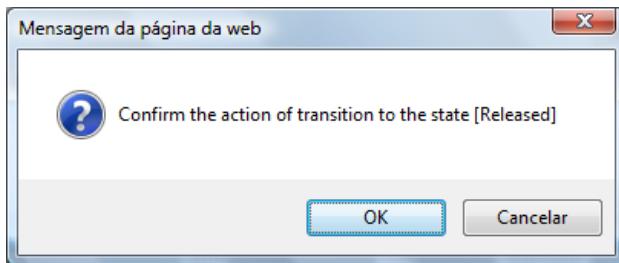
Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Registering

Send tasks
Show publications
Show related documents
Show history
Show tasks
Generate report
 Add content
 Change attributes
 Delete document (highlighted with a red box)
 Release

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The user must confirm the action after clicking the text corresponding to the chosen action.



After confirmation, the document will change state and the document's page will be refreshed. Observe, on the example, that several icons associated with previously authorized procedures have disappeared.

Files				
Name	Type	Size	Reserved	
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB		

Attributes				
Class	Book			
Type	Brazilian novels			
Number	0032			
Title	Diophanes adventures			
Author	Teresa Margarida de Silva e Orta			
State	Released			

PUBLISHING DOCUMENTS

To publish a document which means to link a document to a static public folder, it is necessary to perform the following tasks:

1. Mark a static public folder
2. Link the document to the marked folder

The document publications are modified through the following tasks:

- Check the publications of the document

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- Change or delete the publications of the document

MARKING A PUBLIC FOLDER

Click on the **PUBLICATIONS** menu and select the desired public folder name, as in the following example.

The screenshot shows the Eikon Documents 2007 interface. At the top, there is a logo with two stylized human heads and the text "Eikon Documents". The top navigation bar includes links for "Received tasks", "Sent tasks", "New document", "Lists", "Publications" (which is highlighted with a red box), "Favorites", "History", and "Logout". On the right side of the top bar, there is a search field and a dropdown menu labeled "Document Names". Below the top bar, the main content area has a title "PUBLICATIONS". Under this title, there is a tree view of public folders: "Library >" (with "By author", "By type", and "New books" under it, with "New books" also highlighted with a red box); "Manufacturing >", "Marketing >", and "Planning >". At the bottom of the main content area, there is a timestamp "17/04/2011 19:06:44" and a footer with links for "Received tasks", "Sent tasks", "New document", "Lists", "Publications", "Favorites", "History", "Logout", "Password change", "Email change", "Home page change", "Mudar para Português", "User Guide", and "Links". The footer also includes a copyright notice: "Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved."

The current content of the selected public folder will be displayed, in accordance with the user access permissions.

Click on **MARK FOLDER** on the right side of the icon located on the work space.

The screenshot shows the Eikon Documents 2007 interface. The top navigation bar and search bar are identical to the previous screenshot. The main content area now displays a list titled "NEW BOOKS" with the sub-header "2 selected documents, in order of [Last Update]". The table has columns for "Class", "Name", "Version", "State", "Description", and "Last update". There are two rows of data:

Class	Name	Version	State	Description	Last update
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55

On the right side of the table, there is a context menu with three options: "Mark Folder" (highlighted with a red box), "Generate report", and "Up one level".

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The icon  will be added to the right of the folder name, confirming that the public folder has been selected to receive subsequent document linking. Moreover, the page header will now present a direct link to the folder page.



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

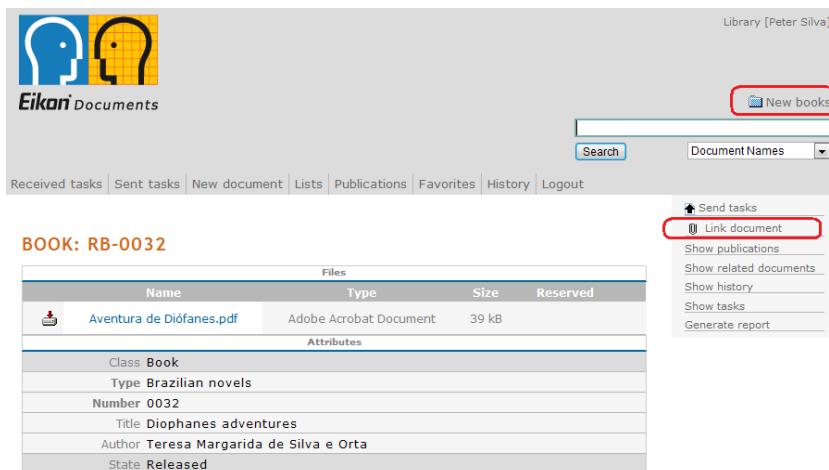
New books

Unmark Folder
Generate report
Up one level

Class	Name	Version	State	Description	Last update
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01

PUBLISHING A DOCUMENT IN THE MARKED FOLDER

After locating the document of interest and accessing its document page, click on **LINK DOCUMENT** at the right of the icon  located on the command area. See the following example:



Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Name	Type	Size	Reserved
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class	Book
Type	Brazilian novels
Number	0032
Title	Diophanes adventures
Author	Teresa Margarida de Silva e Orta
State	Released

Send tasks

Link document

Show publications
Show related documents
Show history
Show tasks
Generate report

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A form will be displayed where the user may inform the document publication period on the folder previously marked.

PUBLISH [BOOK: RB-0032] EM [NEW BOOKS]

Complete and submit the form

Perpetual

Start:

End:

The linking of the document to the static public folder will be confirmed by displaying an updated list of publications of the document.

BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

Folder	Type	Start	End	Responsible	Date		
New books	Perpetual			Peter Silva	17/04/2011 19:17:59		

[Document main page](#)

VERIFYING THE DOCUMENT PUBLICATIONS

Click on the **SHOW PUBLICATIONS** menu located in the document commands area.

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files

Name	Type	Size	Reserved
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class Book
Type Brazilian novels
Number 0032
Title Diophanes adventures
Author Teresa Margarida de Silva e Orta
State Released

Send tasks
 Link document
Show publications
Show related documents
Show history
Show tasks
Generate report

The list of document publications will be displayed on the work space.

BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

Folder	Type	Start	End	Responsible	Date		
New books	Perpetual			Peter Silva	17/04/2011 19:17:59		

[Document main page](#)

Eikon Documents 2007 User's Guide

By clicking on any folder name on the document publications list, the user will open up the corresponding folder page.

The screenshot shows the Eikon Documents 2007 interface. At the top, there is a logo with two stylized human figures and the text "Eikon Documents". The top right corner displays "Library [Peter Silva]". Below the logo is a search bar with the placeholder "Search" and a dropdown menu set to "Document Names". A navigation bar at the bottom includes links for "Received tasks", "Sent tasks", "New document", "Lists", "Publications", "Favorites", "History", and "Logout". On the right side, there is a sidebar with options: "Unmark Folder", "Generate report", and "Up one level". The main content area is titled "NEW BOOKS" with a small orange icon. It shows a list of three documents with the following details:

Class	Name	Version	State	Description	Last update
Book	RB-0021		Released	Iracema-José de Alencar	14/05/2010 11:24:55
Book	RB-0031		Released	Memórias póstumas de Braz Cubas-Machado de Assis	15/04/2011 14:39:01
Book	RB-0032		Released	Diophanes adventures-Teresa Margarida de Silva e Orta	17/04/2011 19:04:17

At the bottom of the main content area, there is a timestamp "17/04/2011 19:22:59" and a footer with links: "Received tasks", "Sent tasks", "New document", "Lists", "Publications", "Favorites", "History", "Logout", "Password change", "Email change", "Home page change", "Mudar para Português", "User Guide", and "Links". The footer also includes the copyright notice "Copyright © 1997-2010 Eikon Tecnologia Ltda. All rights reserved."

CHANGING OR CANCELLING THE PUBLICATION OF A DOCUMENT

After obtaining the list of document publications, click on the appropriate icon to change or cancel the document link to the static public folder.

BOOK: RB-0032 - PUBLICATIONS

There is one linkage of this document to public static folders

Folder	Type	Start	End	Responsible	Date	
New books	Perpetual			Peter Silva	17/04/2011 19:17:59	

[Document main page](#)

MODIFYING A PUBLICATION

After clicking on the icon fill out the form and submit it to change the document publication period on that folder.

CHANGE PUBLICATION OF [BOOK: RB-0032] IN [NEW BOOKS]

Complete and submit the form

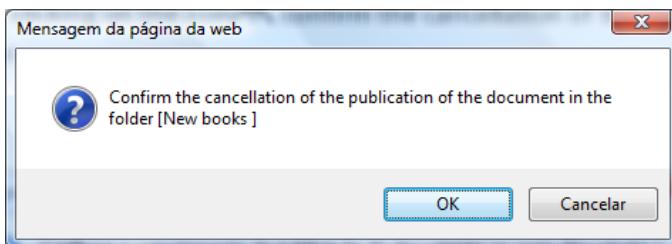
Permanente

Inicio:

Término:

CANCELLING A PUBLICATION

After clicking on the icon  confirm the cancellation of the document publication on that folder.



HISTORY

The software ensures complete traceability by logging all events encompassing:

- Access to documents' contents
- Change of documents' metadata
- Change of documents' contents

USER EVENTS

Click on the **HISTORY** menu to view the user events during a given period of time. The list of events involving the user during a given period will be displayed on the work space.

Change the start and/or end date and click **SUBMIT** to change the viewing period.

Eikon Documents 2007 User's Guide

The screenshot shows the Eikon Documents 2007 user interface. At the top, there is a logo with two stylized human figures and the text "Eikon Documents". The top right corner displays "Library [Peter Silva]". Below the logo, there is a navigation bar with links: Received tasks, Sent tasks, New document, Lists, Publications, Favorites, History (which is highlighted with a red box), and Logout. To the right of the navigation bar are search fields for "Search" and "Document Names", and buttons for "New books", "Generate report (Excel)", and "Generate report (HTML)". Below the navigation bar, there is a "HISTORY" section with a red box around it. This section includes a date range selector: "Events occurring from 10/04/2011 until 17/04/2011" with "Submit" and "Cancel" buttons. A message below the selector says "15 events occurred in the period". A table then lists the events:

Class	Name	Version	State	File	Event	Date/Time
Book	RB-0032		Released		Document state changed	17/04/2011 19:04:17
Book	RB-0032		Registering		Attributes changed	17/04/2011 19:00:58
Book	RB-0032		Registering	Aventura de Diófanes.pdf	Check-out canceled	17/04/2011 18:56:07
Book	RB-0032		Registering	Aventura de Diófanes.pdf	File renamed	17/04/2011 18:52:46

The user can directly obtain the details of the listed documents by clicking on the corresponding icons .

DOCUMENT EVENTS

Click on the command **SHOW HISTORY** located at the specific document's command area to view the events during a particular period, as shown below.

Note that this feature is only available to users who have full permission for the current state of the document.

The list of events involving the document during a given period of time will be displayed on the work space. Change the start and/or end date and click on **SUBMIT** to change the viewing period.

Eikon Documents 2007 User's Guide

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout

BOOK: RB-0032

Files			
Name	Type	Size	Reserved
Aventura de Diófanes.pdf	Adobe Acrobat Document	39 kB	

Attributes

Class Book
Type Brazilian novels
Number 0032
Title Diophanes adventures
Author Teresa Margarida de Silva e Orta
State Released

Send tasks
 Link document
Show publications
Show related documents
Show history (highlighted with a red box)
Show tasks
Generate report

BOOK: RB-0032 - HISTORY

Added by	Added in	Last updated by	Last updated
Peter Silva	17/04/2011 14:16:37	Peter Silva	17/04/2011 19:04:17

Events occurring from until

11 events occurred in the period

User	State	File	Event	Date/Time
Peter Silva	Released		Document state changed	17/04/2011 19:04:17
Peter Silva	Registering		Attributes changed	17/04/2011 19:00:58
Peter Silva	Registering	Aventura de Diófanes.pdf	Check-out canceled	17/04/2011 18:56:07
Peter Silva	Registering	Aventura de Diófanes.pdf	File renamed	17/04/2011 18:52:46
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File replaced	17/04/2011 14:56:33
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:51:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	Check-out canceled	17/04/2011 14:46:50
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File checked-out	17/04/2011 14:43:54
Peter Silva	Registering	Aventuras_de_Diófanes.pdf	File added	17/04/2011 14:43:54
Peter Silva	Registering		Document added	17/04/2011 14:16:37

[Document main page](#)

CHANGING USER PREFERENCES

HOME PAGE AND INITIAL SEARCH PREFERENCE

Click on the **HOME PAGE CHANGE** item at the secondary menu and choose the preferred page to be displayed after login. Options available: Received tasks - *default*, Sent tasks, History, Publications, Favorites and Lists.

The user can also change her initial search preference, choosing among available options.

Eikon Documents 2007 User's Guide

 RECEIVED TASKS

Due from 10/04/2011 until 24/04/2011 Only not completed Include "AUTO" Submit

1 selected task

Due	From	Type	Task	Document	Description	State	Status
18/04/2011	Librarian	For your information	This is a very interesting book.	Book: RB-0031	Memórias póstumas de Braz Cubas-Machado de Assis	Released	

17/04/2011 19:40:19

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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A red arrow points from the text "Click to change the home page" to the "Home page change" link in the footer menu.

HOME PAGE CHANGE

Complete and submit the form

Home page Publications
Initial search on File Contents

Submit

EMAIL

Click on **THE EMAIL CHANGE** item at the secondary menu. Fill in the displayed form and submit it.

EMAIL CHANGE

Complete and submit the form

New email ptsilva@gmail.com
Confirm new email peter.silva@enterprise.com
User ptsilva

Submit

17/04/2011 19:46:09

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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PASSWORD

Click on the **PASSWORD CHANGE** item at the secondary menu. Fill in the displayed form and submit it.

PASSWORD CHANGE

Complete and submit the form

New password	*****
Confirm new password	*****
Current password	*****
User	ptsilva

17/04/2011 19:49:07

Received tasks | Sent tasks | New document | Lists | Publications | Favorites | History | Logout
Password change | Email change | Home page change | Mudar para Português | User Guide | Links
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